


## Product Order Form

To place your order, simply complete this form and return with payment to Gold Seal by either:

 Fax: 02 8353 6699

 Mail: PO Box 443, Potts Point NSW 1335

 Email: [officeadmin@goldseal.net.au](mailto:officeadmin@goldseal.net.au)

On receipt of payment, we will issue a Tax Invoice for your product order. Please call our office on 02 8353 6600 if you have any queries.

### IMPORTANT INFORMATION FOR FINANCIAL PLANNERS & LIFE ADVISERS

- **Independent AFS Licensees with less than 5 advisers** may purchase a single site licence which entitles all staff to use the products.
- Fees for **larger Licensees** depend on the number of advisers you have. To enable us to provide a quotation, please complete the following information and select which products you require by checking the appropriate boxes.
  - Number of Head Office Staff = \_\_\_\_\_
  - Number of Adviser Businesses / Authorised Representatives = \_\_\_\_\_
- **FPA and AIOFP members** receive a 5% discount on all Gold Seal products. Remember to quote your FPA membership number or note your AIOFP membership in Section 3.

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Order	COMPLIANCE PRODUCTS	Prices for up to 5 Advisers (incl. GST)
<b>Gold Book – Business Operations Manual</b>		
<input type="checkbox"/>	Gold Book Initial Licence (for new users)	\$1,265.00
<input type="checkbox"/>	Gold Book Update Service 12-month Subscription (for current users)	\$715.00
<input type="checkbox"/>	Gold Book Initial Licence <u>and</u> Update Service 12-month subscription (* Save 10%)	\$1,782.00*
<input type="checkbox"/>	<b>Gold Seal Compliance and Legal Helpline</b> Annual subscription of 6 hours of telephone and/or email support on compliance, legal and regulatory matters.	\$950.00
<input type="checkbox"/>	<b>Authorised Representative and Distributor Management System</b>	\$3,025.00
<b>Compliance Tools</b>		
<input type="checkbox"/>	Compliance Calendar	\$462.00
<input type="checkbox"/>	Compliance Management Toolkit	\$313.50
<input type="checkbox"/>	Business Continuity Planner	\$302.50
<input type="checkbox"/>	IT Strategy, Plan and Disaster Recovery Planner	\$291.50
<input type="checkbox"/>	Business Planning Template	\$302.50
<b>Advice Tools</b>		
<input type="checkbox"/>	Financial Services Guide (FSG) Template & Content Guide	\$302.50
<input type="checkbox"/>	Product Disclosure Statement (PDS) Content Guide (Insurance intermediaries only)	\$148.50
<input type="checkbox"/>	Statement of Advice (SoA) Template & Content Guide (Financial planners only)	\$495.00
<input type="checkbox"/>	Record of Advice (RoA) Template & Content Guide (Financial planners only)	\$165.00
<input type="checkbox"/>	Statement of Advice (SoA) Template & Content Guide (Insurance intermediaries only)	\$302.50
<input type="checkbox"/>	Product Research Policy and Procedures (Insurance brokers only)	\$550.00
<input type="checkbox"/>	Gearing Policy and Procedures Template (Financial planners only)	\$330.00

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<input type="checkbox"/>	Letter of Engagement Template (Insurance brokers only)	\$148.50
<input type="checkbox"/>	Standard Broking Letters & Manuals (Insurance brokers only)	\$605.00
<input type="checkbox"/>	Client Service Plan (Insurance brokers only)	\$148.50
<input type="checkbox"/>	Uninsured Risk Checklist (Insurance brokers only)	\$148.50
<b>Template Agreements</b>		
<input type="checkbox"/>	Authorised Representative Agreement	\$352.00
<input type="checkbox"/>	Distributor Agreement (Insurance intermediaries only)	\$352.00
<input type="checkbox"/>	Broker Administration Agreement (Underwriting Agencies only)	\$352.00
<input type="checkbox"/>	Referrer Agreement	\$302.50
<input type="checkbox"/>	Outsource Agreement	\$302.50
<b>Australian Financial Services Licensing</b>		
<input type="checkbox"/>	"Do-It-Yourself" AFS Licence Kit	\$3,740.00
<input type="checkbox"/>	Criminal History and Bankruptcy Checks. Price for each person at \$231.00 (incl GST). Number of person(s): _____	\$ _____ . __
<input type="checkbox"/>	Licence Application Review \$2,310.00 (incl GST) Conducted and signoff by Gold Seal Legal Pty Ltd. To be invoiced separately at lodgement of your application.	
<input type="checkbox"/>	Preparation of Core Proofs	\$7,700.00
<input type="checkbox"/>	Preparation of Additional Proofs required by ASIC. (Hourly rate capped at \$8,360.00)	Hourly rate \$418.00
<input type="checkbox"/>	AFS Technical Support. (Invoiced fortnightly)	Hourly rate \$418.00

<b>SUB- TOTAL includes GST :</b>	<b>\$ _____.</b>
<b>Less Discount as applicable :</b>	<b>\$ _____.</b>
<b>Add Credit Card Fee 2% of Sub-total :</b>	<b>\$ _____.</b>
<b>TOTAL AMOUNT PAYABLE:</b> (Includes GST of 10%)	<b>\$ _____.</b>

NOTE: All prices include GST and are effective from 1 July 2011. Prices may change without notice.

For more information about our Compliance products, call (02) 8353 6600 or email [officeadmin@goldseal.net.au](mailto:officeadmin@goldseal.net.au).

For more information or to place an order for our Human Resources products, call (03) 9510 5100 or email [hrrservices@goldseal.com.au](mailto:hrrservices@goldseal.com.au).

Visit [www.goldseal.com.au](http://www.goldseal.com.au) for more information on how Gold Seal can assist you.

Remember to complete the next page, sign and date the form. 

